

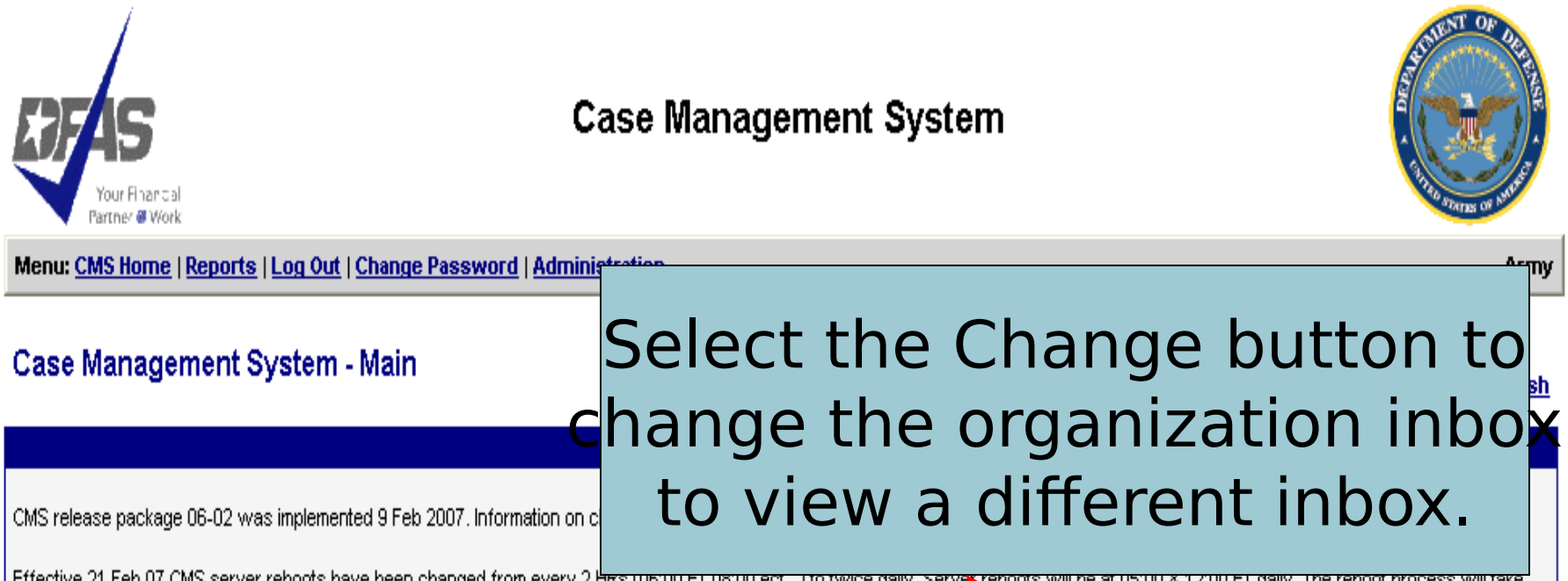
Your Financial Partner @ Work

CMS
Search Capability
May 9, 2012

Search Capability Overview

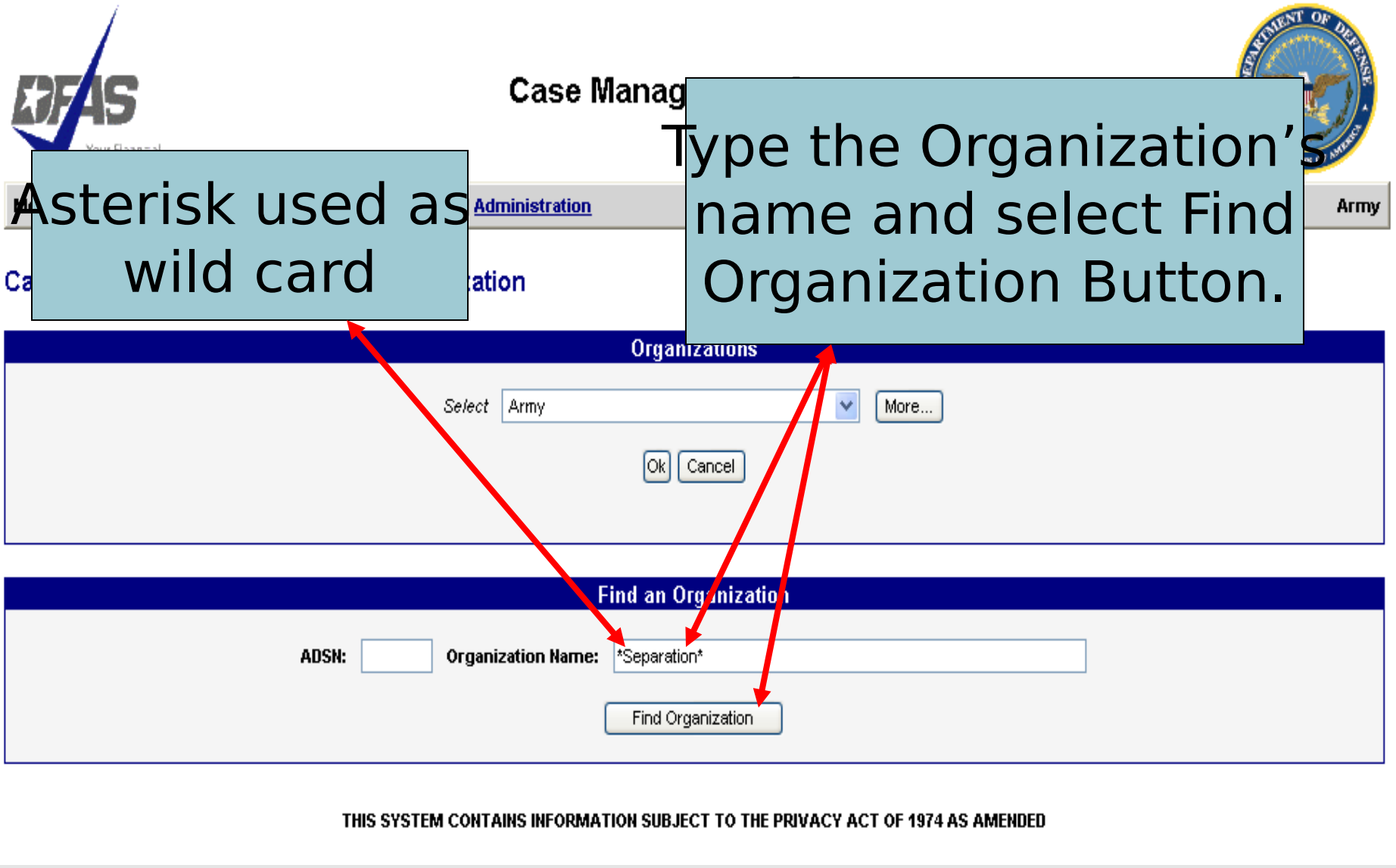
- **Inbox Search Capability**
  - ✓ User can manually change inbox to view different organizations (user must have authorization)
  - ✓ User can change inbox view to different organizations by using search function
  - ✓ User can only view inboxes authorized in CMS. (Parent organizations can view children inboxes.)
- **Case Search Capability**
  - ✓ User can search for cases using different filtering fields
- **Organization Search Capability**
  - ✓ User can search to see if an organization is in the system to refer cases

Inbox Search Capability

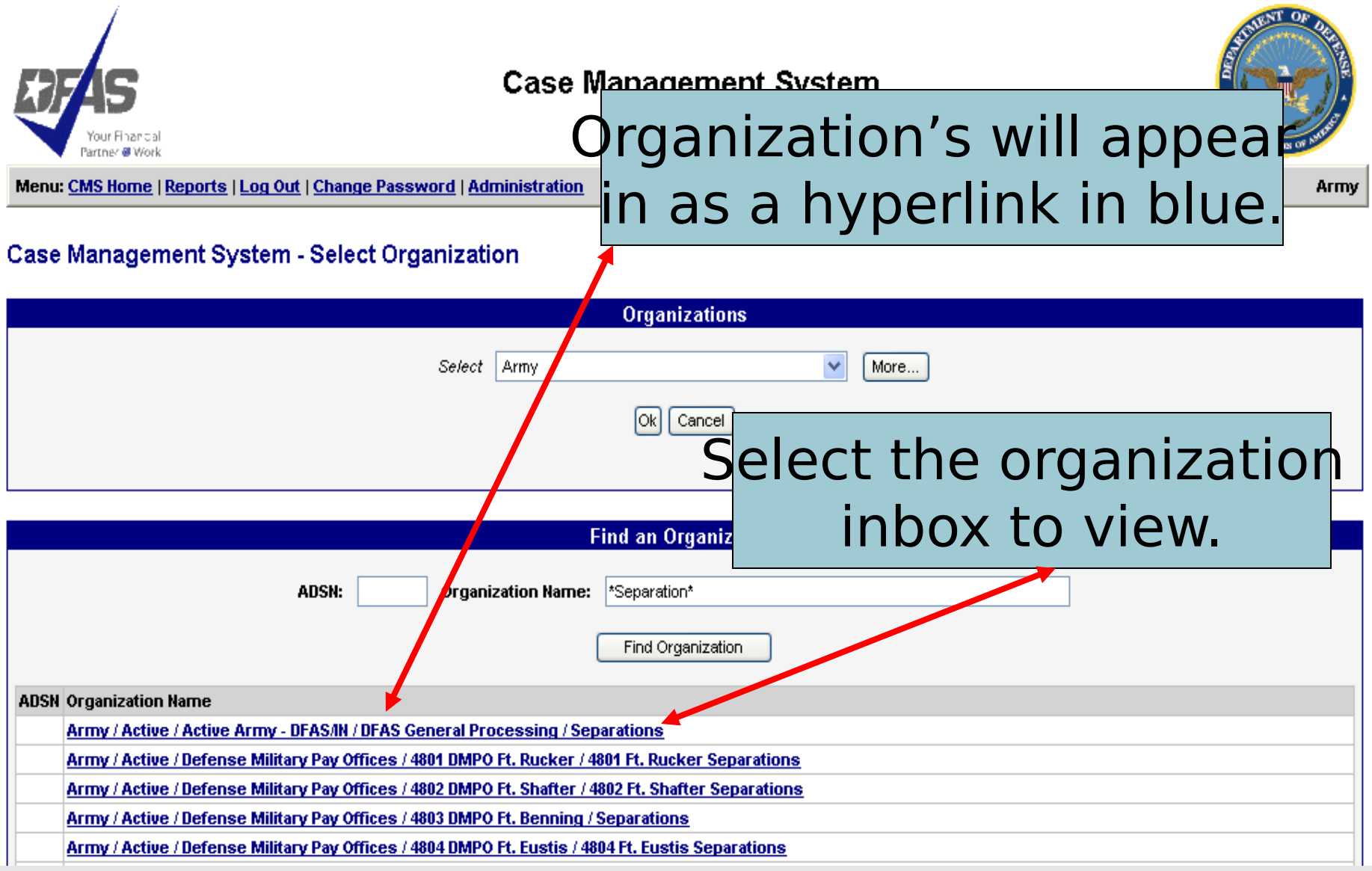


Select the Change button to change the organization inbox to view a different inbox.

Inbox Search Capability



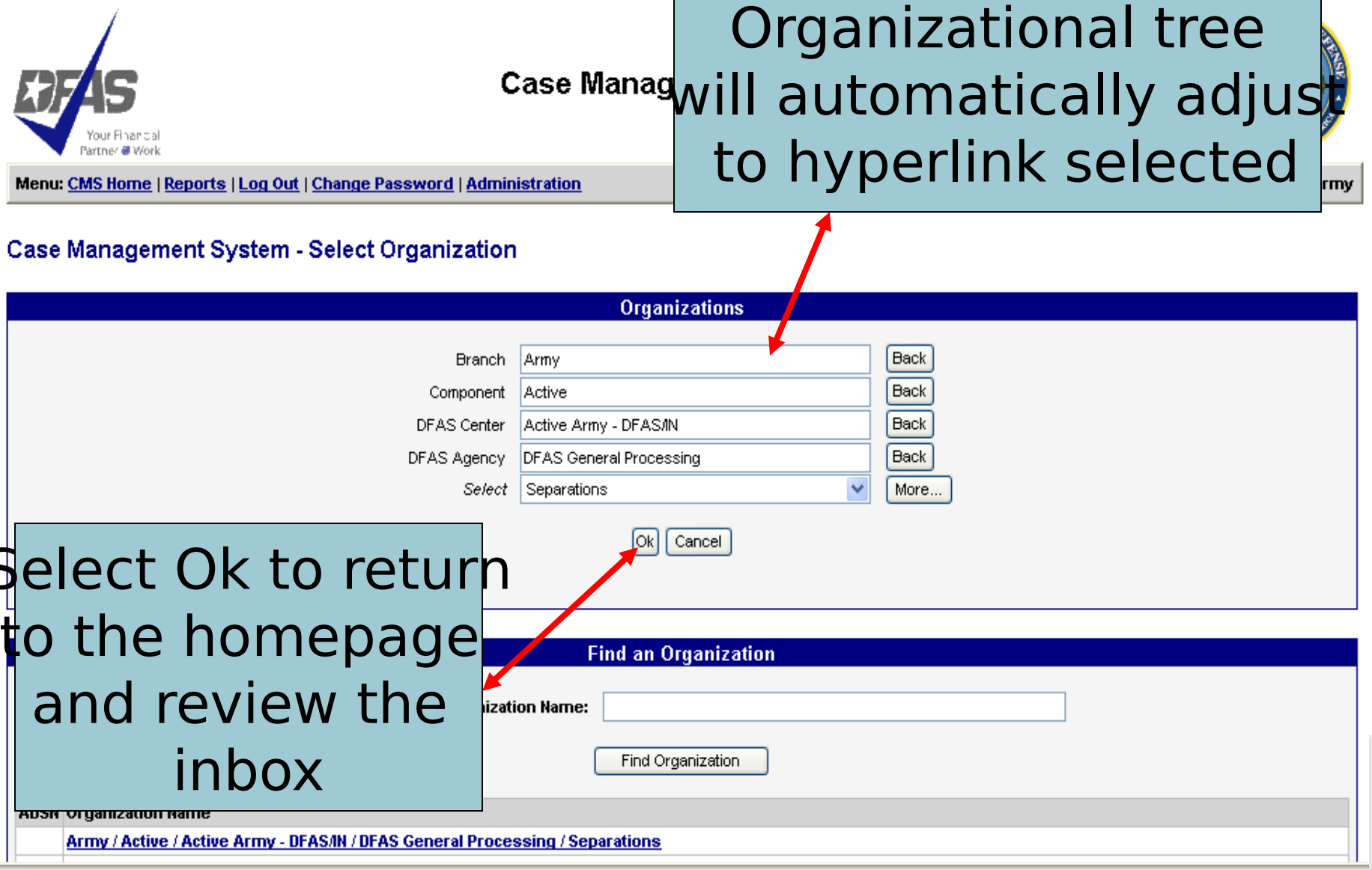
Inbox Search Capability



Organization's will appear in as a hyperlink in blue.

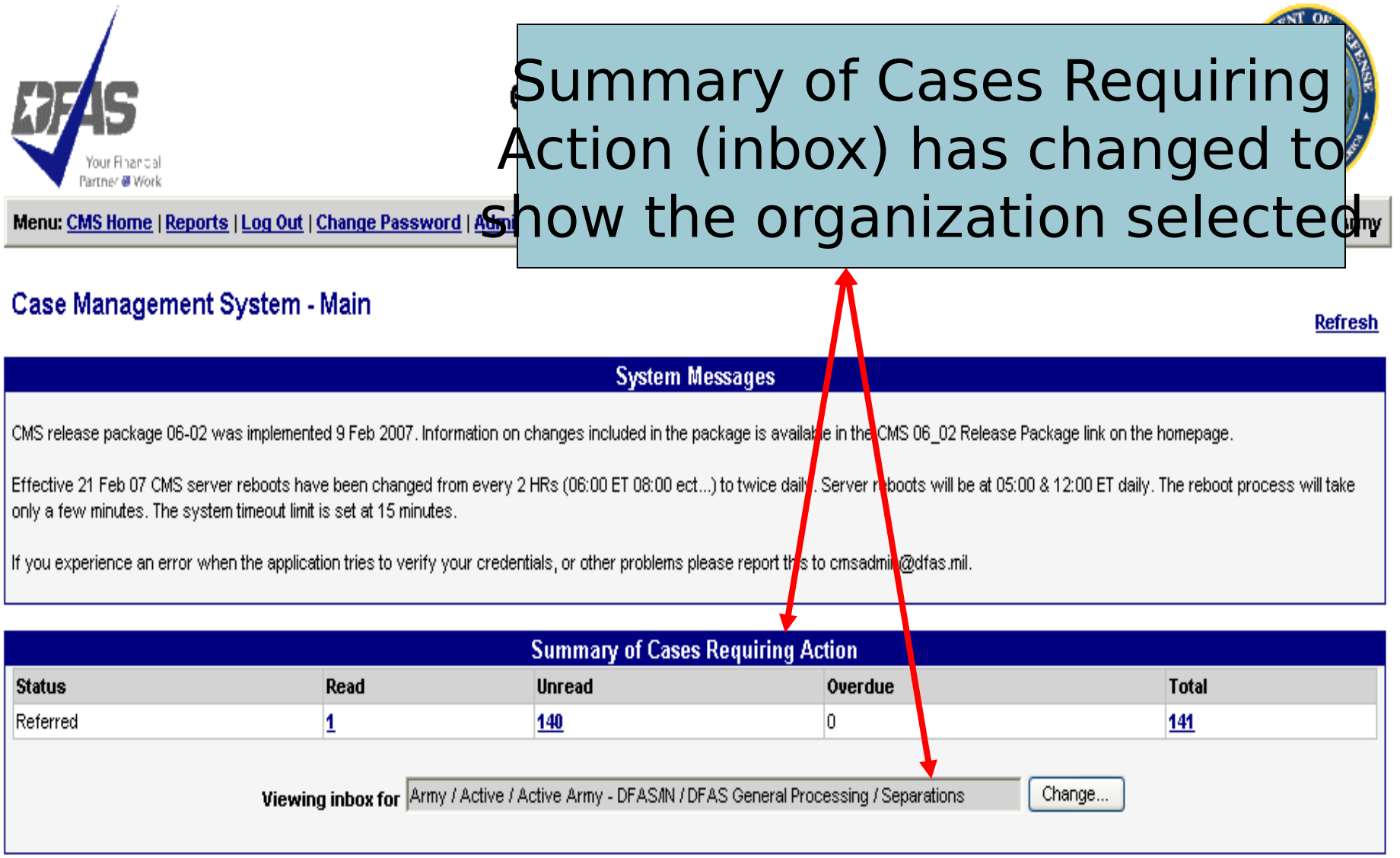
Select the organization inbox to view.

Inbox Search Capability

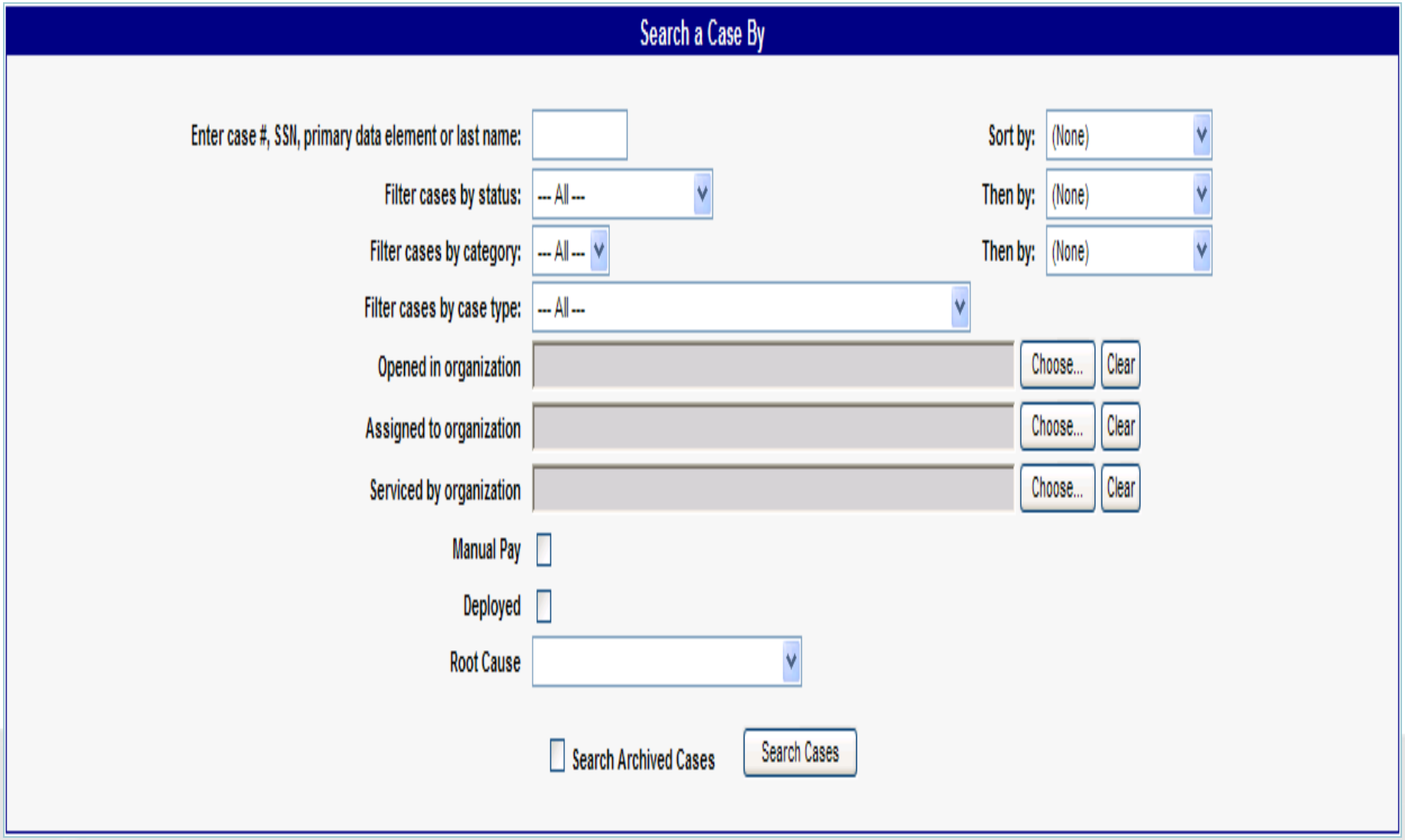


Inbox Search Capability

Summary of Cases Requiring Action (inbox) has changed to show the organization selected.



Case Search Capability



Types of Searches

- **Cases can be searched by using one or more of the following:**
  - ✓ Case#, SSN, or last name
  - ✓ Sort by
  - ✓ Filter cases by status
  - ✓ Filter cases by category
  - ✓ Filter cases by case type
  - ✓ Opened in organization
  - ✓ Assigned to organization
  - ✓ Serviced by organization
  - ✓ Manual Pay
  - ✓ Deployed
  - ✓ Root Cause
  - ✓ Archived Records (All cases closed for more than 12 months plus current month are archived. Case #, SSN, primary data element or last name must be present to open an archived record)

Case#, SSN, or Last Name

- Case #: Enter the case # that is assigned to the case. This narrows the search engine to just the case #.
- SSN: Enter the Soldier's Social Security Number. This narrows the search to all cases entered into CMS with that SSN.
- Last Name: Enter the Soldier's Last Name. This will narrow the search to all cases with that last name.

Sort By, Then By, Then By

- You can sort a case by the following criteria:

  - Case #
  - Date opened
  - Input Point (Organization)
  - Problem Type
  - Category
  - Date Referred/Closed
  - Member's Name
  - Status

- This allows the user to narrow the search and sort by using one to three types of data.

Filter Cases By Status

- This search allows the user to search cases by the following status's:

  - All except closed
  - Referred
  - Action Completed
  - Referred (New)
  - Follow
  - Closed

- This allows the user to narrow the search by the case status in CMS.

Filter Cases By Category

- This search allows the user to search cases by the following categories:
  - Problem – When there is an error in the members pay that cannot be corrected at the organization creating the CMS case, you should use Problem.
  - Process - Select if either an automated process or a work around caused the issue with the member's pay , you should use Process.
  - Query – If a member has a question that cannot be answered on site and has to be referred to another organization, you should use Query.
  - Request – If a specific action or fix is needed, you should use Request.
- This allows the user to narrow the search by the case category in CMS.

Filter Cases By Case Type

- This search allows the user to search cases by different case types. There are currently 132 different types to choice. Some examples are:

  - ✓ BAH
  - ✓ Leave-Special Leave Accrual
  - ✓ Other (this selection should only be used if there is not another selection that would describe the type of case)

- This allows the user to narrow the search by the case type in CMS.

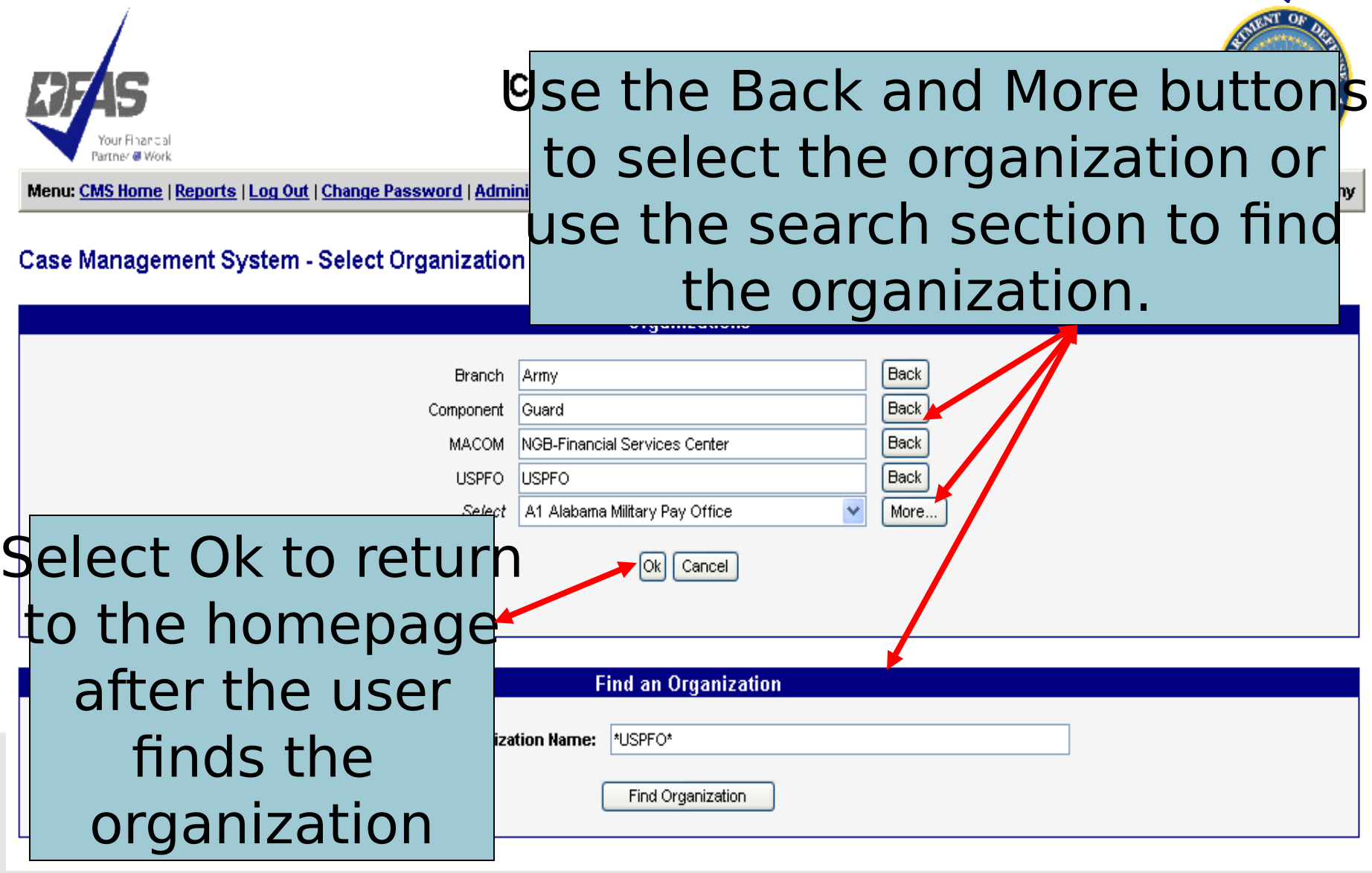
Opened in Organization

- This search allows the user to search cases by the organization that opened the case.

- Selecting this option without any other selection will show all cases opened by that organization.

- Select the organization by clicking on the "*Choose*" button and select the Branch, Component, MACOM, USPFO and State.
  - ✓ Example: Army / Guard / NGB-Financial Services Center / USPFO / A1 Alabama Military Pay Office.

Select Organization



Assigned to Organization

- This search allows the user to search cases by the organization that the cases are currently assigned to work.
- Selecting this option without any other selection will show all cases assigned to that organization.
- Select the organization by clicking on the "*Choose*" button and select the Branch, Component, MACOM, USPFO and State.
  - ✓ Example: Army / Guard / NGB-Financial Services Center / USPFO / A1 Alabama Military Pay Office.

Serviced By Organization

- This search allows the user to search cases by the Servicing organization of the Soldier.

- Selecting this option without any other selection will show all cases serviced by that organization.

- Select the organization by clicking on the "*Choose*" button and select the Branch, Component, MACOM, USPFO and State.
  - ✓ Example: Army / Guard / NGB-Financial Services Center / USPFO / A1 Alabama Military Pay Office.

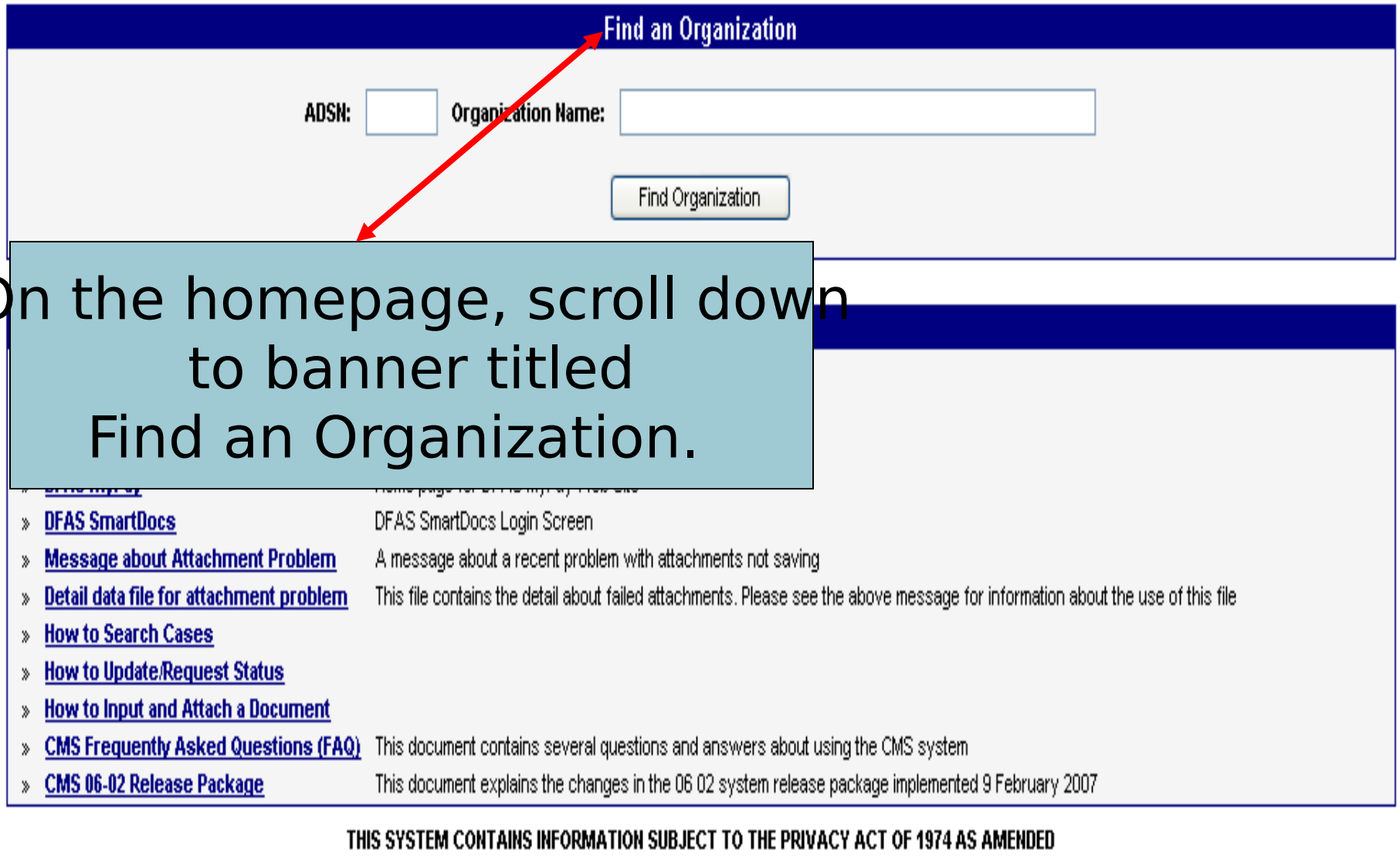
Manual/Deployed

- Manual is selected if the Soldier is paid manually.
- Deployed is selected if the Soldier is deployed or will be deploying within 30 days.
- Manual and Deployed can be selected by clicking on the box.
- This should be selected if the user knows that the box was originally selected when the case was input into CMS.

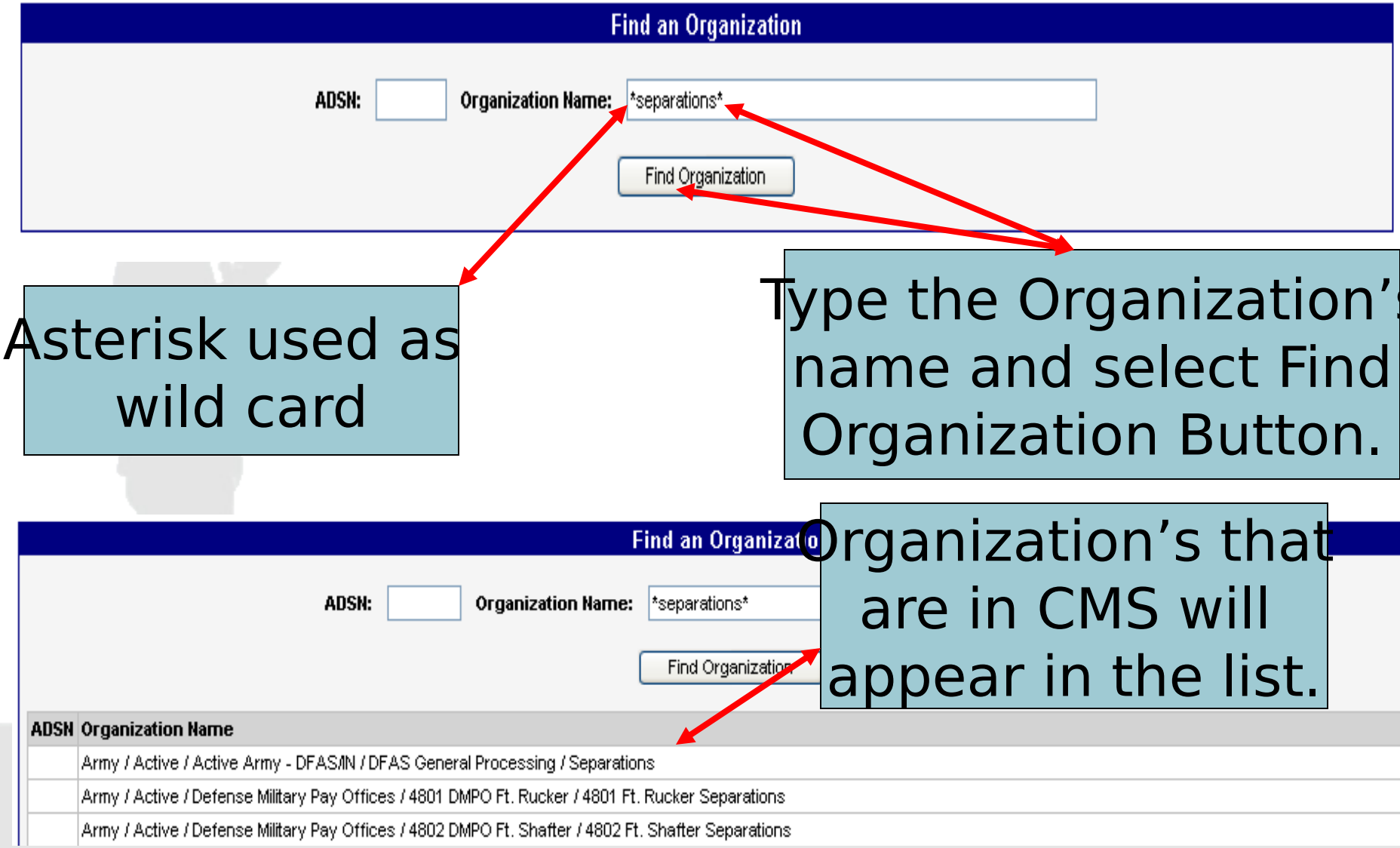
Root Cause

- Unknown
- Missing Documentation
- Case is Invalid
- CZTE Accountability
- DMPO Field Input Error
- DFAS Input Error
- Patient Accountability
- System Error
- System Interface Error
- Member Input Error
- Unit/Command Input Error
- Other

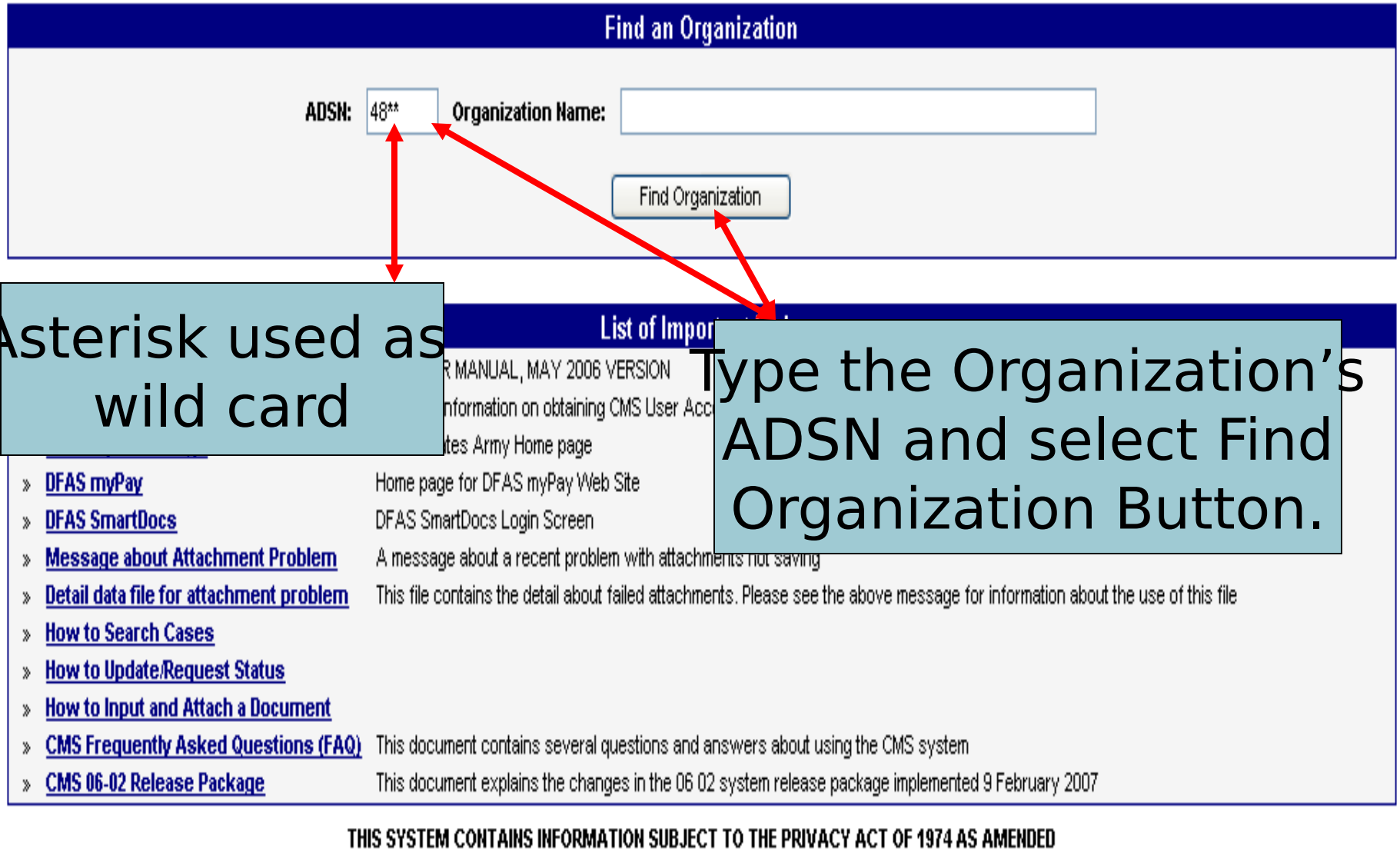
Organization Search Capability



Organization Search Capability



Organization Search Capability



Organization Search Capability

Organization's in CMS that have an ADSN that starts with 48 will appear in the list.

ADSN: 48** Organization Name:

ADSN	Organization Name
4801	Army / Active / Defense Military Pay Offices / 4801 DMPO Ft. Rucker
4802	Army / Active / Defense Military Pay Offices / 4802 DMPO Ft. Shafter
4803	Army / Active / Defense Military Pay Offices / 4803 DMPO Ft. Benning
4804	Army / Active / Defense Military Pay Offices / 4804 DMPO Ft. Eustis
4807	Army / Active / Defense Military Pay Offices / 4807 DMPO IN
4808	Army / Active / Defense Military Pay Offices / 4808 DMPO at Presidio
4809	Army / Active / Defense Military Pay Offices / 4809 DMPO Ft. Belvoir
4810	Army / Active / Defense Military Pay Offices / 4810 DMPO Ft. Sill
4811	Army / Active / Defense Military Pay Offices / 4811 DMPO Ft. McCoy
4812	Army / Active / Defense Military Pay Offices / 4812 DMPO Ft. Riley
4813	Army / Active / Defense Military Pay Offices / 4813 DMPO Ft. Huachuca
4814	Army / Active / Defense Military Pay Offices / 4814 DMPO Ft. McPherson
4815	Army / Active / Defense Military Pay Offices / 4815 DMPO Ft. Meade
4816	Army / Active / Defense Military Pay Offices / 4816 DMPO Ft. Buchanan
4817	Army / Active / Defense Military Pay Offices / 4817 DMPO Ft. Richardson
4818	Army / Active / Defense Military Pay Offices / 4818 DMPO Ft. Wainwright
4820	Army / Active / Defense Military Pay Offices / 4820 DMPO Ft. Carson
4821	Army / Active / Defense Military Pay Offices / 4821 DMPO Ft. Leavenworth



INTEGRITY – SERVICE - INNOVATION